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## **CONTRACTOR ESSENTIALS<sup>®</sup> - THE SERVICE MANAGER MODULE<sup>®</sup>**

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The Service Manager module assists you in entering, scheduling and tracking all of your service calls, appointments and maintenance contracts.

### **INCOMING SERVICE CALLS**

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The incoming service call screen is ideal for managing the many tasks of your CSR or receptionist. Quick lookups are available by customer name, site name, partial address, and phone number. A list of user defined problem descriptions is also available to streamline the data entry process. A click of a button brings up all the history associated with previous service calls for this customer allowing you to instantly analyze trends.

### **SCHEDULING**

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Ease of use and access to key information is readily apparent in the fully functional “Drag and Drop” design of the scheduling screen. Simply moving your mouse over any appointment on the schedule immediately pops up all the necessary detail for the call. In addition, color-coding of zones (areas of service) and priority designations give the scheduler the ability to analyze the day’s calls at a glance. Multiple views are available which give you the ability to view the entire schedule for a day or “drill-down” to a single technician’s schedule for a date range.

Additional options allow you too schedule sales reps, estimators, installers, or any employee to a job, customer, lead or an appointment.

### **SERVICE CONTRACTING**

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One of the best potential revenue streams for any service company is preventative maintenance contract sales. With the Service Management and Dispatch module, the process of creating contracts, scheduling contract calls, generating invoices and revenue schedules is handled from one entry screen. Contract renewals are easy and an interface with the Marketing module allows you to custom design your contract renewal letters.

### **REPORTING**

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From call schedules to equipment history and materials needed reports, there are many types of reporting options available. These reports can be easily viewed on screen, exported to file, or printed in hard copy format

### **EMAILING**

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The Service module allows you to email work orders to technicians in a variety of formats from limited character straight text to PDF attachment. Additionally, the module allows you to email an employee’s schedule for a date range to the employee and appointment confirmations to customers.